

ORACLE[®]

INSTANTIS **EnterpriseTrack**

Administrator's Guide
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Oracle Instantis EnterpriseTrack Administrator's Guide

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INTRODUCTION

This document provides an overview to the administration capabilities in the Oracle Instantis EnterpriseTrack System. EnterpriseTrack is a project and resource portfolio management system that can be used to manage top-down initiatives and strategy project portfolios. The project portfolio types that EnterpriseTrack can manage in a single system are Operational Excellence, IT/PMO, New Product Development, CapEx projects, etc. You can deploy and manage all these different initiatives from the same installation. The administration and configuration capabilities described in this document allow you to tailor the terminology and functionality for each initiative. Depending on your needs, the system you are working with has been configured for one or more initiatives.

For details regarding the user visible project portfolio management capabilities of EnterpriseTrack, please refer to the EnterpriseTrack Project Portfolio Management User Guide.

DOCUMENT CONVENTIONS

The following conventions are used in this manual to convey instructions and information:

- The description of a menu item and its sub-items is described in this document as **View → Toolbar → Display Print-Data Toolbar**, where you should click on the **View** Page Menu, then find the **Toolbar** sub-item and then click on the **Display Print-Data Toolbar** sub-item.
 - Screen names and field names in bold text.
 - The actions you need to take on each screen are in bold text.
-



Means reader take note. Notes contain helpful suggestions and information.

RELATED DOCUMENTS

- User Guide
- Quick Reference Guide
- MS Project Integration Guide
- Dashboards and Reports User Guide
- Integration API Reference Guide
- Installation Guide

THE TOP NAVIGATION BAR

The Top Navigation bar is active when you log into the system. It contains the Application Level menu and depending on the context, a Module Level menu.

- The **Home** button takes you to your default home page. When the Left Navigation bar is hidden, it is displayed on the blue banner. When the Left Navigation bar is displayed, the **Home** button is displayed on the Left Navigation bar.
- The **Go To** menu provides access to all major modules within the EnterpriseTrack system. The items displayed in this menu depend on the features enabled for your deployment and your permissions.
- The **Create** menu displays menu options to create a new project, proposal, idea, program, resource or message, etc.
- From the **My EnterpriseTrack** (terminology is configurable) menu you can view all your open action items on Projects, Proposals, Ideas, Timesheets etc. You can also view your profile, messages, certifications, permissions, preferences and passwords.
- The **View** menu allows you to display toolbars at the Top banner, and Left Navigation bar. You can also save your settings.
- In the text box **Type Project ID or name**, you can type the Project ID or any part of the name and as you type, the system gives you project choices that match the ID or name you are typing.
- The **Advanced Search** menu gives you different ways for searching the system. You can search on projects, proposals, documents, etc.
- From the **Help** menu, you can launch the online help in a new window or send a feedback by selecting the Feedback option, or launch UPK.
- Click on the **Logout** button at any time to log out.

VIEW SETTINGS AND PERSISTENCE

You can control the views of various aspects of the screen to show or hide elements such as:

- Left Navigation (Icons and/or Text)
- Top Banner (showing logo and user name)
- Toolbars (above lists of projects, work breakdown structure etc.)
- Column selection (on project lists, work breakdown structure etc.)

You can set the view settings just for this log-in session. Every **View** menu also comes with a **Save View Settings** option that allows you to save your settings for the next log-in. As an


Administrator you can also use this to save settings for users belonging to a particular System Access Profile or for all users of the system globally.

THE LEFT NAVIGATION BAR

To display the left navigation bar, from the top navigation bar select the **View** menu and choose **Display Left Navigation**. Select if you want to display icons only or icons and text.

You will see a similar navigation menu on the left wherever you are in the application. The list of menu items displayed depends on the features enabled for your deployment and your permissions.

As you drag the mouse over these items, you will see clickable items change color. Current selection will always be highlighted. Clicking on any of these options typically takes you to a listing page with summary information. For example, the *Projects* tab will take you to a listing of all the projects that you are associated with in some capacity (i.e., you could be playing any role on the project). Listings on the page appear separated by the initiative they belong to.

Use the  button on top of the Left Navigation bar to expand and collapse the Left Navigation bar to shows icons and text or just icons.

ADMINISTRATION OVERVIEW

The Administration screens allow you to manage your deployment by changing various aspects of the application. Click on the **Administration** link in the Left navigation Bar or select **Go To → Administration** from the Top Navigation Bar to access the Administration resource User Interface (UI).



The Configuration section allows you to make changes to the system even when the system is in production mode. Oracle recommends that you do not make major structural changes to the system when the system is running in production mode.

Access to the Administration and Configuration UI is controlled through permissions. The Administration link is displayed only if you have permissions to access at least one Administration section. You can use following tabs on the System Administration module to set and manage EnterpriseTrack:

- **Resource and Security Admin:** From this tab you can create resources and System Administrators, manage resource access profiles, and manage roles and permissions.
- **Application Configuration:** From this tab you can configure activity templates, roadmaps, non-WBS roadmaps, project types, dependency types, and resource assignment types. You can also manage finances, pull-down values, status reports, calendars, time reporting categories, Email notifications, custom fields, idea routing, approval routing and the language catalog

filters. From this tab you can also add a login warning message, manage portal settings, set default date format, manage company information and set max rows for reports and My Work.

- **Application Settings:** This tab allows you set various application specific settings, for example you can restrict report attachments and document sizes, and manage password history, etc.
- **Data Import and Export:** From this tab you can download templates, import and export data.
- **Background Jobs:** From this tab you can view the submission status of all rate change requests.

SET UP ACTIVITY LABOR COST CAPITALIZATION

Set up the finance template to include all the sub-categories like standard effort, overtime effort, timesheet effort and timesheet overtime effort even if you are not currently using these categories. Labor cost data will not rollup properly if the template is not set up as per the recommendations.



Follow the configuration steps carefully to ensure labor costs rollup from activities to finances. Contact Oracle Support if you have any questions.

To setup and configure Activity Labor Cost Capitalization:

1. Modify the finance template.

Category	Forecast	Forecast	Fiscal Y
	2012	2013	
	Jun/12 - Dec/12	Jan/13 - Dec/13	
Benefits	\$0		\$0
Benefits	\$0		\$0
Team Finances	\$0		\$0
Expenses			\$3,960
Resource Operational Expense			\$0
Standard Effort			\$0
(hours)			0
Overtime Effort			\$0
(hours)	0		0
Timesheet Standard Effort	\$0		\$0
(hours)	0		0
Timesheet Overtime Effort	\$0		\$0
(hours)	0		0
Non-Resource Expenses	\$240,000		\$3,960
Capital			\$0
Resource Capital Expense			\$0
Standard Effort			\$0
(hours)			0
Overtime Effort			\$0
(hours)	0		0
Timesheet Standard Effort	\$0		\$0
(hours)	0		0
Timesheet Overtime Effort	\$0		\$0
(hours)	0		0

Fin. Category Type: Operational Expense - Resource Activity based Finance Category

Fin. Category Type: Capital Expense - Resource Activity based Finance Category

1. Ensure that the finance template has a separate category for **Capital Expense** and **Operational Expense**.
 2. The **Capital** parent category should include a sub-category **Resource Capital Expense** of type *Capital Expense-Resource Activity based Finance Category*. It should include all standard effort, overtime effort, timesheet effort and timesheet overtime effort.
 3. The **Expense** parent category should include a **Resource Operation Expense** sub-category of type *Operational Expense-Resource Activity based Finance Category*. It should include all standard effort, overtime effort, timesheet effort and timesheet overtime effort.
 4. The Expense parent category should include a **Resource Neutral Expense** sub-category of type *Resource based Finance Category*. It should include all standard effort, overtime effort, timesheet effort and timesheet overtime effort.
2. Create Labor Expense Types (LETs) based on your company's business needs.
 3. You can set a default LET in the activity template.
 4. Manage the Activity Labor Cost settings.
 1. Select **Yes** for the field *Is Labor Cost Capitalization Enabled*.
 2. Select **Yes** for the field *Is Labor Expense Type required for Activities*. Oracle recommends that you mark **Yes** for this field if you have enabled Labor Cost Capitalization.
 5. Enable project level efforts.
 6. From the Advanced Configuration section, select the link **Feature Settings** next to your project initiative.
 - Select the Enable/Disable checkbox next to *Display Project Level Efforts*.
 7. Edit project finance settings. Ensure that the Project Manager has enabled these settings.
 1. The *Finance Tracking Start Date* should be the same date as the project start date. The actuals will not flow if they are not the same.
 2. Select **Yes** for *Resource Computation Enabled*.

RESOURCE MANAGEMENT

MANAGE RESOURCES

Once you have your new system set up, you are now ready to set up all resources (people and equipment). If you are authorized to set up new resources in your system, Oracle would have provided you a login, password combination with System Administrator privileges.

Select the **Resource and Security Admin** tab, click on the **Manage Resources** link. You will see a list of resources displayed. From the **Actions** pull-down menu, you can select, edit, copy or delete existing resources.

ADDING A RESOURCE

To add a resource, do the following:

1. Select **Create →Resource**. The **Add New Resource** screen is displayed.
2. Provide the required information for the new resource on this page. Required field names highlighted in red.
3. Click the **Add Resource** button to add the new resource.



The system privileges of resources are pre-determined by their System Access Profile and the role that they play on a project.

On the **Add New Resource** screen, you can select the System Access Profile as well as allowed roles a resource can have on projects. The actual role a resources plays in a project is determined by the Project Manager when selecting team members during project creation. You can also search for existing resources.

RESOURCE TYPES

You can choose to add a person or equipment.

PERSON

For a person, the fields require more information on the resource.

EQUIPMENT

For equipment, details like the make, model, owner, etc. are required. The status assigned may be active for equipment, but login is not applicable.

AREA OF EXPERTISE, INITIATIVE AND ROLE SELECTION

You can select the **Area of Expertise**, **Initiatives** and **Roles** from the options for each given on the **Add New Resource and Edit Resource Info** screen. The area of expertise can be used for making approval requests.

TIME REPORTING AND RATES

You can select a calendar from the drop-down list. You can also specify the labor rate (resource rate or role rate) to use for this resource.

EDITING RESOURCE INFORMATION

To edit resource details for an existing resource, from the **Resource Listing** page select the resource and from the **Actions** pull-down menu choose **Edit**. You can choose to edit the following tabs: **Details**, **Area of Expertise**, **Certifications**, **Assets**, **Calendar**, or **Rates**.

You can click on the **Person** or **Equipment** buttons as shown below to track resources depending on the resource type. The information fields change automatically depending on which resource type you choose.

To save your changes, click **Update** and to cancel the changes, click **Cancel**. To delete the resource, click **Delete**. To add or view certifications owned by this resource, click **Manage Certs**. To add or view assets, click **Manage Assets**.

MANAGE SYSTEM ADMINISTRATORS

You can manage System Administrators by selecting the **Resource and Security Admin** tab and clicking on the **Manage System Administrators** link. You can create new System Administrators by clicking the **Add System Administrator** button or edit existing system administrators by clicking on the last name or the login ID of the System Administrator.

MANAGE PERMISSIONS

The initial list of System Access Profiles and roles with relevant permissions are setup in the system during configuration phase.

You can also add new Access Profiles using the UI as needed.

To change permissions for different system access profiles and roles, select the **Resource and Security Admin** tab and click on the **Manage Permissions** link. Select one or more permissions categories and click the **Edit Permissions** button.

If you do not select a category all permissions categories will be displayed on the next screen.

Use the vertical and horizontal scroll bars to view additional permissions and Access Profiles/roles respectively. Permissions that are not applicable for an Access Profile or role are indicated with n/a.

MANAGE RESOURCE SYSTEM ACCESS PROFILES

You can create new Resource System Access Profiles by selecting the **Resource and Security Admin** tab and clicking on the **Manage Resource System Access Profile(s)** link. The **Resource Access Profile List** screen displays a list of access profiles already created in the system.

You can select an existing resource access profile to edit the display name, default landing page and columns to be displayed on the project listing page.

The columns selected here for a System Access Profile is the pool of columns available to the end user. The user can further personalize columns to view a smaller subset of columns by default.

To configure the list of available columns on the **Project Listing** page for each System Access Profile, click the **Configure Default Project Listing Columns** button.

Click the left and right buttons to add and remove columns. Use the **Up** and **Down** buttons to move the selected columns to the left or right. The topmost column is displayed on the farthest left of the screen.

You can create a new title by clicking on the **Create a New Resource Title** button. After a title is created, you will need to edit permissions for the title by clicking on the **Manage Permissions** link.

You can also specify a home page, project landing page and the listing columns to be displayed in the resource interface by title.

MANAGE RESOURCE ROLES

All roles assigned to a project are displayed on the *Team Composition Settings* page. Select the **Resource and Security Admin** tab and click the **Manage Resource Roles** link.

You can assign roles based on specific requirements for approval before staffing. You can also request resources for project at proposal stage, request resources during project execution and set routing rules for resource requests.

ADDING A NEW ROLE

To add a new role, click the **Add a New Role** button.

On the **Create New Role** page, you can request roles and approval for a specific number of hours per week for different project categories like project management, team meetings, etc.

EDITING A ROLE

You can edit a role by clicking the **[Edit]** link in the **Team Composition Settings** page. If there is a discrepancy between estimated hours of utilization in a project during creation of a new role and the actual hours utilized during a project, you can edit the number of hours, etc. on the **Edit Role** page. This can be done both for a person or equipment. You can specify whether a particular role is required for the full duration of the project from the project creation phase to the end, or if a role is required only for one phase.

You can also set the maximum number of allowed users for a particular role in a project. For example, there can only be one Project Manager, but numerous individual contributors on a project.

You can specify whether a role needs an approval in a project. You can also set up notification intervals for project due dates on this page. You can also enter the actual hours of utilization for different project categories.

EDITING ROLE RATES

To edit the labor rates for all resources associated with a role:

1. Select the **Resource and Security Admin** tab.
2. Click the **Manage Resource Roles** link.
3. Select a role and click the **[Edit Rate]** link next it.
4. Edit the current Standard, Overtime, and Setup rates, or click **[Add Row]** to add a new row to the rate table.
5. Click the **Calendar** icon and select the effective start date.
6. Enter the Standard Labor Rate (per hour).
7. Enter the Overtime Labor Rate (per hour).
8. Enter the Setup Labor Rate.
9. Click the **Update** button to save your changes.

-
- Role rate is always in system currency.



- Changes to the role rates will result in recalculating the cost for all open projects where the role rate is in effect. Changes to role rates are not allowed if it violates any project finance lock/closed period. Oracle recommends that you change role rate such that it does affect the existing project finance lock/close periods.
-

VIEWING RATE CHANGE HISTORY

To view all labor rate changes associated with a role:

1. Select the **Resource and Security Admin** tab.
2. Click the **Manage Resource Roles** link.
3. Select a role and click the **[Edit Rate]** link next it.
4. Click the **[View rate change history]** link.

MANAGE RESOURCE RATE

From the *Manage Resource Rate Default Rules* screen you can specify the resource rate. Only resources with *Modify Team Member Rate* permissions can change the resource rate.

To set a resource rate:

1. Select the **Resource and Security Admin** tab.
2. Click the **Manage Resource Rate Default Rule** link.
3. Select **Resource labor rate** or **Role labor rate**.
4. Click **Update**.



- Changes to the resource rates will result in recalculating the cost for all open projects where the role rate is in effect. Changes to role rates are not allowed if it violates any project finance lock/closed period. Oracle recommends that you change resource rate such that it does affect the existing project finance lock/close periods.
- Currency for resource cannot be changed after creation.

MANAGE RESOURCE STATUS

Use the *Manage Resource Status* screen to create and manage multiple resource statuses. For example, you can create a status called *Inactive Transferred*, for resources that no longer work for your organization, or *Resource Active* for resources that are currently employed.



Once you create a status, you cannot delete it. You can only change the status to **Inactive**, or **Archived**.

To add a new resource status:

1. Click the **Resource and Security Admin** tab.
2. Click the **Manage Resource Status** link.
3. Click the **Create a New Resource Status** button.
4. Enter a name for this status and click the **Create** button

To manage resource statuses:

1. Click the **Resource and Security Admin** tab.
2. Click the **Manage Resource Status** link. The *Resource Status List* screen is displayed.
3. Select a resource status from the list.
4. Change the status to **Valid**, **Invalid**, or **Archived**.
5. Click **Update**.

MANAGE LOGIN LOCKS

If Resource ID and Password validations are enabled for a deployment, users could get locked out of the system if they exceed a configurable number of failed login attempts. To unlock one or

more user, select the **Resource and Security Admin** tab and click the **Manage Login Locks** link.

FINANCE MANAGEMENT

MANAGE GLOBAL FINANCIAL SETTINGS

To change the global financial administration parameters from the **Application Configuration** tab page click the **Manage Global Financial Settings** link.

Users can use global lock month or project level lock month. Depending on the process a company follows, advanced finances may be reviewed or locked once a month or a quarter.

If finances are locked, then users cannot edit the finances. As the Administrator, you can lock finance review, advance the lock month or release the lock.


MANAGE CURRENCIES

You can manage multiple currencies by selecting the **Application Configuration** tab and clicking on the **Manage Currencies** link. When you click on the link, currencies currently configured in the system are displayed. You can edit the display names for the currency or the symbol by clicking on the **[Edit]** link for a given currency.

You can add new currencies to the system by clicking on the **Create a New Currency** button. Select a currency and enter the display names, symbol, default conversion rate and multiplier for the new currency.

MANAGE CONVERSION RATES

You can manage monthly conversion rates by selecting the **Application Configuration** tab and clicking on the **Manage Conversion Rates** link. Click on the link and select a currency. The UI will refresh with monthly conversion rates for a given year. You can enter conversion rates in one US Dollar equivalent for each month. If you want the value entered in a cell to be copied to future

months, click on the cell and then click on the  button to copy values forward.

MANAGE FINANCE TEMPLATES

You can use the Manage Finance Templates screen to edit finance categories and change the multiplication factors for each field. Select the **Application Configuration** tab and click on the **Manage Finance Templates** link to view the Manage Finance Template screen.

The default finance template is installed when the system is first deployed. You can modify this template using the **Finance Templates** screen. You can also create a new finance template that Financial Administrators and other users can use by copying an existing template and then making the necessary changes.



The default template cannot be changed or deleted.

To copy or create a new template of the **Finance Template** page, click **[Copy]**. To edit details available on the **Finance Template** page, click **[View Details]**.

To set up or edit the Excel spreadsheet view of the finance template, click **[MS Excel]**.

EDITING FINANCE TEMPLATES

To edit the general information about a finance template, select the **Application Configuration** tab and click the **Manage Finance Templates** link. Click the **[Edit]** link in the **Action** column of the appropriate template. You can modify the following fields described in this section.



To leverage resource rates and compute resource costs based on effort tracked, resource computation should be set to **Yes**. This will ensure that effort will be tracked and costs will also be rolled up.

GENERAL DETAILS

- Finance Template Name

The name by which this template will be referred to in the User Interface. E.g. Global Finance Template

- Description

Provide greater detail about the template.

FINANCE TRACKING DETAILS

- Finance Tracking Months

The number of months for which financial data is to be tracked.

- Default Finance Tracking Start Date

The date from which financial tracking should begin. E.g. the Project Start Date or the Planned Project Close Date.



These settings are only defaults and can be changed at the project level.

- **Enable Finance Tracking Sub-window**

Setting this to Yes will allow users to enter financial information within a set time frame within the tracking months. The sub-window can be defined only if financial data is being entered in the Monthly mode. A date range and start date for the sub-window must also be defined.

FINANCE DATA ENTRY DETAILS

- **Default Finance Edit Mode**

The default mode for tracking financial data. You can choose from Monthly, Yearly or Aggregate. If you choose the Yearly mode, and you are tracking finances over 5 years, the user will see five columns (with some potential spill-over based on the specific dates). In the Aggregate mode, users will enter a lump-sum amount.

- **Allowed Finance Edit Modes**

These define the other allowed edit modes. Select from Monthly, Yearly and Aggregate. You must select the default edit mode. You can also choose to display additional tabs. These additional tabs are displayed only for visual reporting and will be in read-only mode.



If you choose to allow users to enter an aggregate value for the finances, you must specify the Finance Distribution Months (i.e., the entered lump sum value is to be distributed over X months). You can also set a Finance Distribution Repeat Frequency.

The system will allow you to go from the Monthly mode to a Yearly and/or Aggregate modes. You cannot go from a Yearly mode to the Aggregate mode.

FINANCE TABLE – COLUMN HEADER DETAILS

- **Realized Finances for Open/Closed projects**

The name of the data field that displays the realized financial details. E.g. Actuals.

- **Unrealized Finances for Open Projects**

The name of the data field that displays the as yet unrealized financial details for projects that are still open. E.g. Forecast.

- **Unrealized Finances for Closed Projects**

The name of the data field that displays the unrealized financial details for projects that have been closed E.g. Forecast.

FINANCIAL FIELDS

These financial fields are displayed on the Finance Summary page.

- Net Present Value (NPV)

Measures the excess or shortfall of cash flows, in present value (PV) terms, once financing charges are met. By definition, NPV = Present value of net cash flows.

- Internal rate of Return (IRR)

Is the return rate that can be earned on the invested capital, i.e. the yield on the investment. It is defined as any discount rate that results in a net present value of zero for a series of cash flows.

- Return on Investment (ROI)

Is the ratio of money gained or lost on an investment relative to the amount of money invested.

Enabling these fields will make them visible to users on the Finance Summary page for each project.

EXCEL IMPORT/EXPORT

- Import Finances from MS Excel

Default value for all projects. If answer is set to **Yes**, additional fields are available.

- View Excel Template (name_of_file.xls)

Link to the template file.

- Select Excel Template File

The Excel template files to use.

- Excel template file in sync

This field refers to the Microsoft Excel file associated with the finance template within EnterpriseTrack. When you change the details of the finance template, you should modify the Excel file, upload it to this page and then set this field to **Yes**.



If the Excel Template File is not in sync with the EnterpriseTrack(TM) finance template, then the finance import/export functionality may not work properly. The field *Is Excel Template File in Sync?* is automatically set to **No** when the EnterpriseTrack finance template details are changed. After editing EnterpriseTrack finance template, please update the Excel Template File and upload it and then set the *Is Excel Template File in Sync?* field to **Yes**.

MANAGE FINANCE APPROVAL TEMPLATES

Project Managers can use finance approval templates to dictate the finance approval workflow for their projects. Finance Approval Templates can be used to flexibly configure the approval workflow.

To view information about a finance approval template, select the **Application Configuration** tab and click the **Manage Finance Approval Templates** link. List of available approval templates is displayed.

EDITING FINANCE APPROVAL TEMPLATES

Click the **[Edit]** link in the **Action** column for a specific approval template. Name and description fields for the approval template can be changed.

If the Sequential field is set to **Yes**, then the application will enforce sequential approvals. If **Enforcement Status** is set to **Enforce** required finance validations on project close, then the application will not allow the Project Manager to close the project till all required finance approvals are granted.

VIEWING FINANCE APPROVAL TEMPLATES DETAILS

Click on **[View Details]** associated with a specific **Finance Approval Template** to view the approval steps. You can add new steps, edit or delete existing steps.

CREATING AND EDITING FINANCE APPROVAL DEFINITIONS

To create a new finance approval definition, click on **Add New Finance Approval Definition**. To edit the details of an existing finance approval step, click on **[Edit]**. You can edit the name and description of the approval step.

Request/Approval Optional settings control if the **Request/Approve** buttons are displayed or not.

- Request Optional

If the request is set to **Optional**, approvers can approve without having to wait for a request for approval. In this case both **Request** and **Approve** buttons are displayed in the **Project Finance Validation** screen.

- Approval Optional

If a particular approval step is required and sequential approvals are required, then this approval needs to be granted before the **Request/Approve** button for subsequent steps are displayed.

You can select multiple roles to perform **Request/Approve/Undo** actions for a particular approval step.

MANAGE FINANCE ELEMENT TYPES

Finance element types allow you to define various financial elements and assign a rate per unit for that element.

This ability to create finance element types allows you to use financial and non-financial inputs to calculate financial savings. These settings are defaults and you can modify them from the **Financial Settings** page for each project. For example, you could define an **Element Type** called Man-Hours and assign it a rate of \$20 per unit.

CREATE LABOR EXPENSE TYPES

You can create multiple Labor Expense Types (LETs) based on your business need. The LETs you create are associated with a finance expense category (Capital Expense, or Operational Expense). Project Managers can use these LETs to label project activities. For example, you can create an LET called *Training*, and associate it with the finance expense category *Operational Expense*. Project Managers can mark activities that relate to training expenses under the LET *Training*.

To create Labor Expense Types (LETs):

1. Select the **Application Configuration** tab.
2. Click the **Manage Labor Expense Types** link. The *Labor Expense Type List* screen is displayed.
3. Click the **Create a New Expense Type** button.
4. Enter a name for the LET.
5. Select an expense category from the drop-down list.
6. Click **Add** to add a new LET.

EDIT LABOR EXPENSE TYPES

You can edit Labor Expense Types (LETs) by changing its status and its association with an expense category.

To edit Labor Expense Types (LET):

1. Select the **Application Configuration** tab.
2. Click the **Manage Labor Expense Types** link. The *Labor Expense Type List* screen is displayed.
3. From the **Actions** menu, select the **Edit** link next to the LET you want to edit. The *Edit Labor Expense Type* screen is displayed.
4. You can change the LET and the expense category from the drop-down list.

5. Choose the status of the LET. You can select **Active**, **Invalid**, or **Archived**.
6. Click **Update** to save your changes.



You cannot modify an LET that is currently in use. To deactivate an LET, you have to change the status to **Invalid**.

ROADMAP CONFIGURATION

A project can have one or more activities or phases. For a given phase you can configure an activity template that has an ordered list of tasks and deliverables with tools as necessary. A project roadmap consists of an ordered list of activity templates. Roadmaps created here can be used by a Project Manager during project creation.

ACTIVITY TEMPLATES

To manage activity templates, select the **Application Configuration** tab and click on the **Activity Templates** link. List of current activity templates are displayed.

Activity templates are used in roadmaps as explained in the next section. Changes made to an activity template affect all roadmaps that refer to the template. Existing projects are not affected. When a new project is created, the roadmap as configured at that time is copied into the project. Activity template changes will affect future projects only.

Click the **Create a New Activity Template** button to create a new activity template. You must complete the fields marked with an asterisk (*) to create the required template. You can also set additional details about the activity template in the **Additional Details** fields.

You can also manage permissions for the approvers in the **Approvers** pane and choose to enforce approvals and approvers for the Activity Template.

You can copy an activity template by clicking on the **[Copy]** link. For example, you can copy Define-DMAIC Activity Template to a new template called Define-DMADV and then make changes to this template. You can delete templates by clicking on the **[Delete]** link. To edit an **Activity Template**, click **[Edit]**.

The **Activity Template** page allows you to create tollgates and specify where you need approvers for a project, such as Project Manager.


Tollgates can be:

- Effort-based

This is based on the effort required to get a job done. For example, a paint job may require 40 hours for 4 people working for 5 hours every day to complete the job.

- Duration-based

There may be a required time for the job to be completed. For example, in the instance of the paint job above, it may take a certain amount of time for the paint job to dry up. The lead time cannot be reduced by putting more people to dry the paint.

You can view contents of an existing **Activity Template** by clicking on the activity template name. List of tasks and deliverables is displayed with links to create new tasks and deliverables. Click the  icon to expand the list.

Click on a deliverable or task to view the details. You can delete individual tasks/deliverables by clicking on the deliverables/task name and then clicking **Delete** on the **Details** screen.

To add child activities to the current **Activity Template**, click the **Add Child** icon. You can add gates, tollgates, deliverables, phases and tasks to the template. You cannot add peer activities to a top level activity. However, you can add either a child or a peer level activity to a child activity.

To add peer activities to the current **Activity Template**, click the **Add Peer** icon. You can add gates, tollgates, deliverables, phases and tasks to the template.

CREATING ACTIVITY TEMPLATES

To create a new activity template:

1. Select the **Application Configuration** tab.
2. Click the **Activity Templates** link.
3. Click the **Create a New Activity Template** button. The *Create Activity Template* page is displayed.
4. In installations that have multiple initiatives configured within the same system, select the appropriate initiative from the Initiative pull-down menu.
5. Based on the initiative, the Roadmap family pull-down will be populated. Choose the appropriate roadmap family for your new activity template.
6. Based on the initiative, the *Activity Type* pull-down will be populated. Select the activity type for which this template is being created.
7. Select the activity sub type for this activity template.
8. Enter a name for the activity template. This name will be used within the system and will not be visible to any user other than the System Administrator.
9. From the drop-down list select if this activity template will be used as a **template** or as **creation_defaults**. You can choose to use this as a template for creating activities on roadmaps, or as creation_defaults.

Creation_defaults are used to set default field values so new activities on the Roadmap appear as in-line rows.

10. You can also enter a description and the estimated time duration (in days) for this activity. This will be the default duration for this particular activity in every project that uses this activity template.
11. Select a default Labor Expense Type (LET) from the drop-down list.
12. From the drop-down menu select the Plan Effort Type and Actual Effort Type.
13. Select if you want to enforce resources. If you select **Yes**, then select the mandatory resources. You can also select if all resources are required for this activity type.
14. From the *Approvers* pane, you can manage permissions for the approvers; choose to enforce approvals and approvers for the activity template.
15. From the *Percentage Completion* pane, you can select how you want the percentage complete to be calculated.
16. Click **Create** to save your changes.

ROADMAPS

To manage project schedules (Roadmaps), select the **Application Configuration** tab and click on the **Roadmaps** link. List of current roadmaps will be displayed. Click on the **Create a New Roadmap** button to create a new roadmap.

To copy a roadmap, click [**Copy**]. E.g. you can copy DMAIC roadmap to a roadmap DMAIC-Lean and then make changes to this roadmap. To delete roadmaps, click [**Delete**]. To enable Microsoft Project integration, select the [**MS Project**] link.

To mark the **Status** of the Roadmap as **Valid**, **Archived** or **Invalid**, select the [**Change**] link from the **Status** column. You may want to mark certain **Roadmaps** as **Invalid** if you do not want users to use obsolete roadmaps when creating or editing projects. You cannot create, or edit the roadmap if the status is **Invalid**. If the status is **Valid**, users can use the roadmap when they create or edit projects. If you select **Archived**, the roadmap cannot be used while creating projects but can be used to edit or filter.

In read-only pages, the **Archived** roadmaps are suffixed with ^ and **Invalid** roadmaps are marked with x. While creating projects only valid roadmaps are displayed and while editing, the current roadmap is displayed, but only valid roadmaps are displayed in the drop down option. **Archived** roadmaps do not cause any validation errors.

You can view contents of an existing roadmap by clicking on the roadmap name. List of activity templates and roadmap information is displayed with links to remove existing activity templates from the roadmap.

To add an activity to the roadmap, click on the **Add Activity Template** button.

CREATING ROADMAPS

To create a project roadmap:

1. Select the **Application Configuration** tab.
2. Click the **Roadmaps** link. The *Roadmap List* page is displayed.
3. Click the **Create New Roadmap** button.
4. Select an initiative from the pull-down menu. In installations that have multiple initiatives configured within the same system, select the appropriate initiative from the *Initiative* pull-down menu.
5. Enter a name for the roadmap. This name is used within the system and will not be visible to any user other than the System Administrator.
6. Use the arrows to select the activity types allowed at the top level.
7. Select an activity template from the *Mandatory Activity Template* pull-down menu.
8. Select the *Mandatory Realization Activity Template*.
9. Click **Create Roadmap**.

Field	Description
Roadmap Family	The options you can choose are based on the initiative you selected.
Is Phase Gated Roadmap?	Select Yes if you want each phase on the roadmap to be completed before starting the next.
Show Stages as Tabs?	Select Yes to have top-level activities appear as separate tabs on the Project Roadmap page. Select No to have all the top-level activities appear on the same tab.
Enable WBS Code on Activity	Select Yes if you want to display a hierarchical numbering structure, for example 1, 1.1, 1.1.1, etc. for roadmap activities displayed on a project roadmap.
Allow Template Generated Activities to be Modified?	Select Yes if you want users to modify activities that are automatically generated by the activity template.

Field	Description
Scheduling Mode	<p>Select Manual or Semi-Automatic</p> <p>Manual: EnterpriseTrack does not update the dates on the project roadmap when dependent activities are rescheduled or modified. When dependent activities are rescheduled, you have to manually update the activity dates on the Project Roadmap page.</p> <p>Semi-Automatic: EnterpriseTrack updates the dates when dependent activities are rescheduled. When dependent activities are rescheduled, you can click the Schedule button on the Project Roadmap page for EnterpriseTrack to update the activity dates.</p>
Resource Required to Complete Activities at Top Level?	<p>Select Yes if you require resources to be assigned to top-level activities in order to close them.</p> <p>Select No if you do not require resources to be assigned to top-level activities.</p> <p>Select Activity Type Specific if you want it to be based on the Activity Type setting.</p>
Resource Required to Complete Activities at Other Level?	<p>Select Yes if you require resources to be assigned at other levels in order to close them.</p> <p>Select No if you don't require resource to be assigned.</p> <p>Select Activity Type Specific if you want it to be based on the Activity Type setting.</p>
Allowed Activity Types at Other Levels	<p>Select the activity types allowed at other levels.</p>
Activity Type to Creation-Default Mappings	<p>If activity type to creation default mapping exists, you can select it from the pull-down menu. This mapping allows you to set default field values for roadmap activities so new activities appear on the roadmap as in-line rows.</p>

Field	Description
Is MSP Integration Allowed?	Select Yes if you want to allow MSP (Microsoft Project) integration. You must select a template file before you can export or import data. Click the Browse button and select a template.
Computation mode for dates and duration	<p>Internal: EnterpriseTrack computes the dates and duration.</p> <p>External read-only: The calculation for dates and duration comes from MS Project. Project Managers cannot edit the values in EnterpriseTrack.</p> <p>External read-write: The calculation for dates and duration comes from MS Project. Project Managers can change the values in EnterpriseTrack.</p>
Computation mode for duration and efforts	<p>Internal: EnterpriseTrack computes the duration and effort.</p> <p>External read-only: The calculation for duration and effort comes from MS Project. Project Managers cannot edit the values in EnterpriseTrack.</p> <p>External read-write: The calculation for duration and effort comes from MS Project. Project Managers can change the values in EnterpriseTrack.</p>
Computation mode for efforts and cost	<p>Internal: EnterpriseTrack computes the effort and cost.</p> <p>External read-only: The calculation for effort and cost comes from MS Project. Project Managers cannot edit the values in EnterpriseTrack.</p> <p>External read-write: The calculation for effort and cost comes from MS Project. Project Managers can change the values in EnterpriseTrack.</p>

MS PROJECT IMPORT AND EXPORT

To allow MS Project integration, from the **Roadmap List** screen click the **[MS Project]** link associated with the roadmap. From the **Edit MS Project Import/Export** screen, select **Yes** to enable MS Project import/export. You must select an MSP template file before you can export or import project data.

CREATING NON-WBS ROADMAPS

You can define a list of activities that are outside the project roadmap. These activities are defined as non-WBS activities. This may be a list of change requests, discussions, risks, etc. These activities are not tied to the project roadmap but are associated with a project and are displayed on the Left Navigation Bar.

To create a non-WBS roadmap:

1. Select the **Application Configuration** tab.
2. Click the **Non-WBS Roadmaps** link. The *Non-WBS Roadmap List* screen is displayed.
3. Click the **Create a New Non-WBS Roadmap** button.
4. Select an initiative from the drop-down list. Based on the initiative, the *Roadmap family pull-down* will be populated. Choose the appropriate roadmap family.
5. Enter a name for this roadmap.
6. Click the **Change** button and select an icon for this roadmap. This icon will be displayed in Left Navigation Bar.
7. Enter a left navigation menu name for this roadmap.
8. Choose if you want to enable WBS code on activity.
9. Select an **Activity Type** for this roadmap.
10. If activity type to creation default mapping exists, you can select it from the pull-down menu. This mapping allows you to set default field values for roadmap activities so new activities appear on the roadmap as in-line rows.
11. Click the **Create Non-WBS Roadmap** button.

EDITING A NON-WBS ROADMAP

To edit a non-WBS roadmap:

1. Select the **Application Configuration** tab.
2. Click the **Non-WBS Roadmaps** link. The *Non-WBS Roadmap List* screen is displayed.
3. Click the **[Edit]** link next to the roadmap you want to edit.
4. Click **Update** after you have made changes to roadmap.

DELETING A NON-WBS ROADMAP

To delete a non-WBS roadmap:

1. Select the **Application Configuration** tab.
2. Click the **Non-WBS Roadmaps** link. The *Non-WBS Roadmap List* screen is displayed.
3. Click the **[Delete]** link next to the roadmap you want to delete.
4. Click **OK** to confirm the deletion.

CHANGING THE STATUS

To change the status of a non-WBS roadmap:

1. Select the **Application Configuration** tab.
2. Click the **Non-WBS Roadmaps** link. The *Non-WBS Roadmap List* screen is displayed.
3. Select a roadmap and click the **[Change]** link under the *Status* column.
4. Choose a status (**Valid**, **Invalid**, or **Archived**) for this roadmap.
5. Click **Update** to save your changes.

DEPENDENCY TYPES

Terminology

- Terminology should be configurable at initiative level.
- There are four different predecessor types. The display name for each will have a default but, for a configuration the display name could be changed at initiative level
- A short name (code) also needs to be specified to display in the Roadmap (WBS) and in future to allow quick creation of dependencies



Dependencies will use Current Planned Dates of predecessors to set Current Planned Dates for successors. Similarly Actual Dates of predecessors to set Actual Dates for successors. If Actual date is not populated then corresponding Current Planned date should be used.

PROJECT TYPES

To manage project types, select the **Application Configuration** tab and click on the **Project Types** link. A list of current project types is displayed. Click on **Create a New Project Type** button to create a new **Project Type**.

To edit a **Project Type**, click on an existing project type name. For a project type you can specify one or more valid roadmaps. When a new project is created and the user specifies the Project Type, the available roadmaps for the project are limited to the roadmaps specified here.

You can mark the **Status** of Project Types as **Valid**, **Archived** or **Invalid**. You may want to mark certain Project Types as **Invalid** if you do not want users to use obsolete project types when creating or editing projects. You cannot create, or edit if the status is **Invalid**. If the status is **Valid**, users can use these Project Types when creating, editing or filtering projects. If you select **Archived**, the Project Type cannot be used while creating new projects, but can be used to edit or filter older projects. The historic value is preserved but cannot be used in new projects.

RESOURCE ASSIGNMENT TYPES

Resource Assignment Types allow you to specify responsibility on tasks. Typically four different types of resource types (RACI) can be configured:

- **Accountable (A)**

The resource ultimately responsible for an activity. One function can have only one accountable person.

- **Responsible (R)**

The resource working on the activity and responsible for performing the assigned work.

- **Consult (C)**

Resource that would play a consulting role on the activity. This involves a two-way communication.

- **Inform (I)**

Individual that needs to know of the decision or action. This is usually a one-way communication.

Other assignment types could be RACI-VS (Responsible, Accountable, Consulting, Informed, Verifies Sign-offs), P-S (Primary, Secondary), etc.

To manage resource assignment types, select the **Application Configuration** tab and click the **Resource Assignment Types** link. You can view a listing of the Resource Assignment Types. To create a new assignment type, click **Create New Assignment Type**.

To edit a Resource Assignment Type, follow these steps:

1. Click on the **[Edit]** link.
2. Enter the name of the Resource Assignment Type.
3. Assign a short name for the Resource Assignment Type.
4. To enable the assignment type, click **Yes**.
5. Select **Yes** for the field **Consider For Project Finances?** to add it towards project finance calculation.

6. To sort the order of the Assignment Types by ID, click **Sort Order**. You can click on **Order of Existing Types** to check the order ID of the Assignment Type.
7. Click **Update** to make the changes.

ORGANIZATIONAL HIERARCHY

You can manage your organization hierarchy using the various links in the **Organizational Hierarchy** section under the **Application Configuration** tab. EnterpriseTrack allows you to specify four organization hierarchy levels. Depending on organization hierarchy, you could use all five or turn off the last two levels during the configuration/deployment stage. The names of each level are configurable.

The default system may have Division, Business Unit, Location, Regions, Division-Business Unit-Location Hierarchy, and Division-Location Hierarchy as different levels. Click on the first level – **Division** link to manage Divisions. List of current divisions are displayed. Click on the **Create a New Division** button to create a new division.

To edit a division, click on the **[Edit]** link for an existing division. To reassign all projects and resources belonging to one division to another division, click on the **Reassign** link. To delete a division, click on the **[Delete]** link for an existing division. All other organization hierarchy levels can be managed in a similar fashion.

You can mark the status on any of the five levels of organization hierarchy as **Valid**, **Invalid** or **Archived**. You may want to do this if you do not want users to use a particular organization hierarchy. For example, if you mark the division Consumer Products as **Invalid**, users cannot choose the division Consumer Products while creating or editing projects. If the **Status** is **Valid**, then users can use the hierarchies to create or edit projects. If you select **Archived**, then the hierarchy cannot be used while creating but can be used to edit or filter. The historic value is preserved but cannot be used in new projects. Changing the status on one level of the hierarchy can indirectly affect the other four levels. For example, if you mark BU1 as Archived and Europe is invalid then:

- Overall relationship status is Active Division1->BU2->Asia->China->Shanghai
- Overall relationship status is Archived Division1->BU1^->Asia->China->Shanghai
- Overall relationship status is Invalid Division1->BU1^->Europex->England->London

In read-only pages, the **Archived** hierarchies are suffixed with ^ and Invalid hierarchies are marked with x. While creating projects only valid hierarchies are displayed and while editing, the current hierarchy is displayed, but only valid hierarchies are displayed in the drop down option. Archived hierarchies do not cause any validation errors.

To manage organization hierarchy relationships, click on the **Sector, Sub-Sector, Business Unit, Country, Corporate Hierarchy** and **Organizational Hierarchy** links. Custom hierarchy validations can be incorporated. Division-BU-Location hierarchy is one representative sample.

To create a relationship between different levels, click on the **Create** button. Select the combination of division, sector, sub-sector and business unit and click on the **Create** button.

PULL DOWN VALUES

You can manage the values displayed in various pull-downs throughout the application by clicking on numerous links available in this section. Pull down values that are global are displayed on the left and Initiative specific values are displayed on the right.

Except for the following Pull Down values (Certification Type, Keyword, and Metric Type), you can mark the Status of the other Pull down values as Valid, Archived or Invalid. You may want to mark certain values as Invalid if you do not want users to use obsolete values when creating or editing projects. You cannot create or edit if the status is Invalid. If the status is Valid, users can use these values when they create, edit or filter projects. If you select Archived, the pull down value cannot be used while creating but can be used to edit or filter. The historic value is preserved but cannot be used in new projects.

The table below lists out the meanings of these statuses.

	Entity (Project, Proposal etc.) that has a property that comes from a pull down value.	Editing an existing Entity with a property that has this Status.	Creating a new project with a property that has this Status.	Existing project that is not edited.	Advanced Search filter page
Valid	Available for use in creating new entities and for modifying new entries.	Allowed	Allowed	Is Allowed	Is Displayed
Archived	Available for existing entries but not new ones.	Allowed	Not Allowed	Is Allowed	Is displayed in the pull down list marked with a ^.

	Entity (Project, Proposal etc.) that has a property that comes from a pull down value.	Editing an existing Entity with a property that has this Status.	Creating a new project with a property that has this Status.	Existing project that is not edited.	Advanced Search filter page
Invalid	Not allowed for new entities and for editing existing entities.	Not Allowed You have to edit the Entity to not use the Invalid item.	Not Allowed	Is Allowed	Is displayed in the pull down list marked with a *.

In read-only pages, the *Archived* values are suffixed with ^ and *Invalid* values are marked with x. While creating projects, only valid values are displayed and while editing, the current value is displayed as the selected value but only valid values are displayed in the drop down option. Archived values do not cause any validation errors.

To manage transformation domains, click on the **Process Type** link. List of existing domains are displayed. To create a new transformation domain, click on the **Create a New Process Type** button.

IDEA ROUTING

By default, ideas are routed to the System Administrator. You can specify idea routing rules using the **Project Request Routing** section under the **Administrator** module.

Click on **Edit Project Request Routing** link to edit routing rules. List of existing rules are displayed. To create a new idea routing entry, click on the **Create a New Idea Routing** button.

You can edit existing entries by clicking on the **[Edit]** link. You can specify idea router/owner and the organization hierarchy. Rules are applied in the order indicated.



You cannot delete the Global entry.

APPROVAL ROUTING

Role Approvers:

- Approvers are linked to roles.

- Similar to Idea Routing Workflow for each role there is a list of owners by Organization, and wild cards for default routing.
- If no routing information is setup for a role, then users cannot submit requests for the role.
- Alternatively, there could be a catch-all routing rule that works across roles in case certain roles do not have any routing rules.
- For generic team member assignment, you can use organization based routing for team member role.

Routing Tag

- This field should be enabled if feature master setting for resource approval workflow is enabled.
- In addition to organization based routing, a generic free form text field could be used to find additional matches within a given organization (display distinct tags for the matching organization).

For example, a large business unit may have more than 3000 users. For routing rules, in addition to specifying BU1, you can add a tag for Temp Hires. Any user that falls under that organization and has the tag Temp Hires would automatically be selected. There might be another user in BU1 with tag Employees who would be the selected approver for employees in BU1.

INTERNATIONALIZATION

Static content in the application such as resource interface strings, field names, error messages, etc. can be localized by sending the language catalog to a translation vendor. Typically these strings do not change frequently and the translation effort needs to be done once per release.

Dynamic content in the application such as Pull-down values, Organization Hierarchy drop downs, etc., keep changing as you make changes to the application configuration. By default, various pull down values visible in the application are entered in English using the **Administration** module.

USING THE LANGUAGE CATALOG FILTER

You can use the Language Catalog page to edit the language catalog. If you have customized EnterpriseTrack with custom terms or configuration data, you can add or edit the translations using the Language Catalog page. If you have a large number of custom strings that require translation, you can export the language catalog as an XLIFF file, translate the strings and import it into EnterpriseTrack.




- Oracle recommends that you save a copy of your language catalog in each language before you modify the catalog or before you import a new language catalog.
 - You must first click the **Scan Language Catalog** button to ensure that the catalog has all static strings that contain the customized terms before you begin modifying the language catalog.
-

To use the language catalog filter:

1. Select the **Application Configuration** tab.
 2. Click the **Language Catalog** link. The *Language Catalog Filter* page is displayed.
 3. Click the **Scan Language Catalog** button.
 4. When the scan is complete, select the filtering criteria from the *Language Catalog Filter* page. Since the catalog can contain thousands of terms, it is recommended that you set some high level filtering options (e.g. by language, or category) for ease of use.
 5. Choose the number of results you want displayed on each page.
 6. Choose the status (**Translated** or **Not yet Translated**).
 7. Click **Apply**. The *Language Catalog* page displays a list of terms that meet your criteria.
-



When the list is displayed, you can view the details of the current filter by clicking the  **Show Current Filters** icon. You can also filter by selecting a language from the displayed options.

EDITING THE LANGUAGE CATALOG

To edit the language catalog:

1. From the *Language Catalog* page, click the **Edit** link next to the term you wish to edit. The *Edit Language Catalog* page is displayed.
2. Make the appropriate changes.
3. Click the **Update** button to save your changes.

EXPORTING AND IMPORTING THE LANGUAGE CATALOG

- From the *Language Catalog* page, click the **Export** button and click **OK** to save the XLIFF file.
- From the *Language Catalog Filter* page, click the **Browse** button and select the translated file, and click **Import**.

CUSTOM FIELDS

There are two types of custom fields:

- Pre-defined custom fields
- User-defined custom fields

PRE-DEFINED CUSTOM FIELDS

Pre-defined custom fields are defined during configuration stage while User-defined custom fields can be defined even after the application is live. Pre-defined custom fields are displayed in different UI sections in the application and the user cannot tell the difference between standard fields and pre-defined custom fields. Pre-defined custom fields can support complex logic to retrieve information. User-defined custom fields are displayed in the custom fields sections in the UI.

To edit the pre-defined custom fields:

1. Select the **Application Configuration tab**.
2. Click the **Manage Custom Fields** link.
3. Click the **Pre-defined Custom Fields** link. On the *Edit Pre-defined Custom Fields* page you will see list of all the custom fields within the system. These may be organized by section E.g., Ideas, Proposal, Project, Program and User.
4. In installations that have multiple initiatives configured within the same system, you will be able to filter your list by initiative. To view custom fields for a particular initiative, select the appropriate initiative using the check box and click the **Go** button.
5. To modify a field name, locate the field in the appropriate section and type in the new name in the field.
6. Use the check-boxes in the column on the right to determine whether or not the field should be visible, added to filters or added to list pages. Some fields may not be available for modification based on its definition in the configuration file. To modify the configuration file contact Oracle Customer Support.
7. Click **Update** to save your changes.
8. Click **Cancel** to leave the page without saving any changes.
9. If you are editing a pre-defined custom project field, then select the custom proposal/charter field that it maps to. When a proposal is accepted and a project is created, the proposal custom fields are copied into the project custom fields based on its mapping.



You can have one custom proposal/charter field map to multiple project custom fields.

MANAGE CUSTOM FIELDS

You can create new custom fields by clicking on the **Manage Custom Fields** link. A list of existing custom fields is displayed. Click on any pre-defined field to view details.

CONFIGURING USER DEFINED CUSTOM FIELDS

To create custom fields:

1. Select the **Application Configuration tab**.
2. Click the **Manage Custom Fields** link.
3. Click the **User-defined Custom Fields** link.
4. In installations that have multiple initiatives configured within the same system, you will be able to filter your list by initiative. To view custom fields for a particular initiative, select the appropriate initiative using the check box and click the **Go** button.
5. Click the **Create a New Field** button.
6. On the *Create User-defined Field* page enter a field name.
7. Choose the type of field you are creating. Fields can be one of the following types: floating point (a number with a decimal point), integer (whole number), a list of items, or plain text. Associate the field with an object in the system E.g., Ideas, Proposal, Project, Program and User.
8. Define whether the field is visible to users.
9. Define whether it is a required field or not. If you choose **Yes**, the system will force users to assign a value to this field.
10. Based on the type of field you selected, enter the minimum, maximum and valid values for this field. These fields are optional.
11. To enter multiple values in the *Valid Values* field for a List type field, enter one value per line.
12. Enter the Order ID for this new field to tell the system where it should be located in the list of user defined field for this particular object. You can click the **Order of Existing Fields** link to view the existing list before entering a number in this field. You must select an associated object before you click this link.
13. If you are editing a custom project field, then select the custom proposal/charter field that it maps to. When a proposal is accepted and a project is created, the proposal custom fields are copied into the project custom fields based on its mapping.



You can have one custom proposal/charter field map to multiple project custom fields.

14. Click **Create** to save your changes.

15. Click **Cancel** to leave the page without saving any changes.



You cannot delete custom fields after they are created. You can hide the field by selecting **No** in the *Visible* field.

MANAGE COMPANY INFORMATION

You can use the *Manage Company Information* screen to add your company name, company URL, product name and footer.

To edit your company information:

1. Select the **Application Configuration** tab.
2. Click the **Manage Company Information** link. The *Edit Company Information* screen is displayed.
3. Enter the appropriate values.
4. Click **Update**.

MANAGE LOGIN WARNING MESSAGE

You can use the *Manage Login Warning Message* screen to add any warning message or terms of use you would like displayed on the Login screen.

To edit the login warning message:

1. Select the **Application Configuration** tab.
2. Click the **Manage Login Warning Message** link. The *Edit Login Warning Message* screen is displayed.
3. Enter the message.
4. Click **Update**.

MANAGE PORTAL SETTINGS

You can use the *Manage Portal Settings* screen to create a user ID and password to access the Idea Portal. Users can use this ID and password to enter the Idea Portal without logging into EnterpriseTrack.

To manage portal settings:

1. Select the **Application Configuration** tab.
2. Click the **Manage Portal Settings** link. The *Edit Portal Settings* screen is displayed.
3. Enter a portal ID and Password.
4. Click **Update**.

MANAGE MAX ROWS FOR REPORTS

Use the *Manage Max Rows For Reports* screen to limit the number of rows to display in reports.

To edit the settings:

1. Click the **Application Configuration** tab.
2. Select the **Manage Max Rows for Reports** link. The *Edit Max Rows for Reports* screen is displayed.
3. Enter the value.
4. Click **Update**.

MANAGE MAX ROWS FOR MY WORK

Use the *Manage Max Rows For My Work* screen to limit the number of rows to display on the My Work page.

1. Click the **Application Configuration** tab.
2. Select the **Manage Max Rows for My Work** link. The *Edit Max Rows for My Work* screen is displayed.
3. Enter the value.
4. Click **Update**.

MANAGE DEFAULT DATE FORMAT

Use the *Manage Default Date Format* screen to select a default date format to use in EnterpriseTrack.

To select a default date format:

1. Click the **Application Configuration** tab.
2. Select the **Manage Default Date Format** link. The *Edit Default Date Format* screen is displayed.
3. Select a format from the drop-down list.
4. Click **Update**

WEEKLY STATUS REPORTS

EnterpriseTrack allows users to complete and submit status reports for each project.

Some of the fields included in the status report are pre-defined within the system, but as the Administrator, you can specify additional fields that should be part of the weekly status reports. These additional fields are added as text boxes to the status report.

To create and manage project related status reports sections, select the **Application Configuration** tab and click the **Manage Status Report Sections** link. All the available sections are listed. To modify an existing section, click the **Edit** link. To create a new section, click the **Create New Section** button. To delete an existing section, click the **Delete** link.

MANAGE STATUS REPORTS

You can use the *Manage Status Reports* screen to configure status reports. You can choose the sections you want displayed, change the section names, change the name of the submit button, and also set the frequency of status reports

To manage status reports:

1. Select the **Application Configuration** tab.
2. Click the **Manage Status Reports** link. The *Manage Status Reports* screen is displayed.
3. Select the status report you want to edit.
4. Make the necessary changes and click the **Save** button.

MANAGE KEY STATUSES

You can use the *Manage key Statuses* screen to set status descriptions for the keys. For each initiative, you can create multiple statuses. For example, you can create a status called *On Time*, or *Red*, or any numeric value that describes the status of keys.

To create a status for keys:

1. Select the **Application Configuration** tab.
2. Click the **Manage Key Statuses** link.
3. Click the **Add a New Key Status** button.
4. Enter a description of the status.
5. Select if you require users to add an explanation for this status.
6. Click **Update**.

To manage statuses:

1. Select the **Application Configuration** tab.
2. Click the **Manage Key Statuses** link.
3. To edit the status:
 1. Click the **[Edit]** link next to the status you want to edit.
 2. Make the necessary changes and click the **Update** button
4. To delete a status:
 1. Click the **[Delete]** link next to the status you want to delete.
 2. Click **OK** to confirm the deletion.

MANAGE KEYS

You can use the *Manage Keys* screen to create and manage keys that appear on status reports. For each initiative, you can configure multiple keys. For example, you can create a key called *Time* or *Budget*.

To create a key:

1. Select the **Application Configuration** tab.
2. Click the **Manage Keys** link.
3. Click the **Add a New Status Report Key** button. The *Create Status Report Key* screen is displayed.
4. Select an initiative from the drop-down menu.
5. Enter a name for this key.

6. Select if you want this to be an aggregate key.
7. Enter an order ID. This determines where it is displayed in status reports.
8. Click **Create**.

To manage keys:

1. Select the **Application Configuration** tab.
2. Click the **Manage Keys** link.
3. To edit the status:
 1. Click the **[Edit]** link next to the key you want to edit.
 2. Make the necessary changes and click the **Update** button
4. To delete a status:
 1. Click the **[Delete]** link next to the key you want to delete.
 2. Click **OK** to confirm the deletion.

MANAGE CALENDARS

As an Administrator, you can create multiple calendars that are specific to your company, department, organization, or country. You can create a calendar and mark working days, non-working days, and add exceptions to your calendar. You can also manage calendars by editing a calendar, copying a calendar, viewing calendar usage, and viewing the exceptions list of a selected calendar.

An email is sent to Project Managers when calendar or exception changes are made to projects with status Active or On Hold, even if the project's date range is not affected by the changes.

CREATE A NEW CALENDAR


To create a new calendar for your organization, follow the steps below:

1. Select the **Application Configuration** tab.
2. Click the **Manage Calendars** link. The main *Calendars* page is displayed.
3. Click the **Create** button on the top right corner of the screen. A pop-up window is displayed.
4. Enter a name for your calendar and click **OK**. The *Manage Calendars* page is displayed.
5. Enter the number of working hours per day.
6. Choose the status **Valid**, **Invalid**, or **Archived**.
7. Select **Yes** you want this to be the default calendar.

8. Click to select the working days. From the calendar you can click the tab for each month and year. Click on any date to set an exception. The **Manage Exceptions** pop-up window displays. Enter the name for the exception and choose if you want it to be considered a working day or a non-working day. Click **Save**.
9. Click **Save** to save this calendar or click **Save and Close** to save and return the main Calendar page.

EDIT A CALENDAR

To edit a calendar, follow the steps below:

1. Select the **Application Configuration** tab.
2. Click the **Manage Calendar** link. The main *Calendars* page is displayed.
3. Click the **View** link next to the calendar you want to edit. The *Manage Calendars* page is displayed.
4. You can edit the calendar by clicking on the **Edit**  button and making changes to the number of working days, the number of working hours, or by adding/deleting exceptions.
5. From the calendar you can click the tab for each month and year. Click on any date to set an exception. The *Manage Exceptions* pop-up window displays. Enter the name for the exception and choose if you want it to be considered a working day or a non-working day. Click **Save**.
6. To delete an exception, click on a date to select it. The *Manage Exception* pop-up window is displayed. Click **Delete**.
7. Click **Save** to save this calendar or click **Save and Close** to save and return the main **Calendar** page.

COPY A CALENDAR

To copy an existing calendar, follow the steps below:

1. Select the **Application Configuration** tab.
2. Click on the **Manage Calendar** link. The main *Calendars* page is displayed.
3. Click the **Edit** link next to the calendar you want to copy. The *Manage Calendars* page is displayed.
4. Click the **Copy** button on the top right corner of the screen. A pop-up window is displayed. Enter a name for this copy. Select if you want to copy the exceptions. Click **OK**.

VIEW USAGE

To view the calendar usage, do the following:

1. Select the **Application Configuration** tab.
2. Click on the **Manage Calendar** link. The main *Calendars* page is displayed.
3. Click the **Edit** link next to the calendar you want to view. The *Manage Calendars* page is displayed.
4. Click the **View Usage** button on the top right corner of the screen. A list of projects and proposals that use this calendar is displayed.

MANAGE EMAILS

You can enable email notifications for different events that occur in a project by selecting the **Application Configuration** tab and clicking the **Manage Email**. As the administrator, you can specify the recipients, subject and description of emails to be sent out.

To edit, click on the **[Edit]** link from the *Email Configuration List* page. On the **Edit Email** page, you can select different types of recipients and click **<< TO** to add them to the recipient list. You can also change the subject of the email. To save your changes, click **Update**.

TIME REPORTING CATEGORIES

Administrators can setup Time Reporting Categories using the three links displayed below.

Using the *Timesheets* module, users can report time against these categories. In addition, users can report time against specific tasks and deliverables assigned to them. **Resource Utilization** chart displays the time spent by resources across these categories.

Administrators can specify default hours for roles against these time reporting categories. For example, if a Coach is expected to spend typically 4 hours per week per project on coaching and mentoring new project managers, then for the Coach role, the Coaching category default could be set to 4 hours. At project level this value could be overridden.

PROJECT TIME REPORTING CATEGORIES

To create/edit categories, select the **Application Configuration** tab and click on **Project Time Reporting Categories** link. Time spent in managing a project, team meeting, project reviews, etc. can be reported against **Project Time Reporting Categories**.

To create a new category, click on the **Create** button. Click on an existing category to change the display name or order in which it is displayed.

NON-PROJECT TIME REPORTING CATEGORIES

To create/edit categories, select the **Application Configuration** tab and click on **Non-Project Time Reporting Categories** link. Time spent in non-project activities such as training, administrative matters, etc. can be reported against Non-Project Time Reporting Categories.

To create a new category, click on the **Create** button. Click on an existing category to change the display name or order in which it is displayed.

NON-WORKING TIME REPORTING CATEGORIES

To create/edit categories, select the **Application Configuration** tab and click on **Non-Working Time Reporting Categories** link. Time spent on holidays, vacations, etc. can be reported against Non-Working Time Reporting Categories.

To create a new category, click on the **Create** button. Click on an existing category to change the display name or order in which it is displayed.

MANAGING STATUS INDICATORS

System Administrators must configure and manage the status indicators displayed in the **Tree Pane** within the **Strategy** section of EnterpriseTrack. You can create multiple Status Indicator lists.

Each status indicator list can have a number of items, each with its own color and value assigned to it. You can also choose to have the indicator icon blink.

CREATING A STATUS INDICATOR

To create a new Status Indicator, select the **Application Configuration** tab and click the **Manage Status Indicator** link. Click the **Create a New Status Indicator** button. Add items as required and specify the color and value for each one. Click the **Add Status Indicator** button to add this configuration to the list of Status Indicators in the system.

SETTINGS

From the **Application Settings** tab you can set parameters to manage each project.

MANAGE FINANCE LOCK/CLOSE PERIOD ENFORCEMENT SETTINGS

To configure the finance lock settings:

1. Select the **Application Settings** tab.

2. Click **Manage Finance Lock/Close Period Enforcement Settings** link.
3. Select an initiative and click the **[Edit]** link next to it.
4. Select **Strict** or **Limited**.
5. Click the **Update** button to save you changes.



Oracle does not recommend changing the enforcement mode on a live production system. When the mode is changed, it takes effect only for new projects created from that point of time. Old projects continue in the previous enforcement mode and cannot be changed.



In the **Limited** mode, the finance lock/close period enforcement is guaranteed only when roadmap activities are used with Actual Effort Type (AET) set to Effort from Finances. Finance lock enforcement is not guaranteed when used with any other AET.



If finance lock is set to **Strict**, you cannot change the currency exchange rate or labor rates for locked/closed financial periods. For roadmap activities, the Actual Effort Type (AET) is restricted to Effort at Resource Level (Detail), Effort from Timesheet, and Effort from Finances.

The following table lists the supported options for both the Strict and Limited modes.

	Strict Mode	Limited Mode
Enforcement	Always Guaranteed	Not Guaranteed. Guaranteed only when used with AET set to Effort from Finances, finances are edited in the monthly mode, and resource rates are explicitly overridden at the project level. Enforcement is through manual process.
Resource labor rate, role, labor rate changes	Not allowed if it can affect a finance lock/close period in any project.	System does not check for violation and finance lock/close period integrity is not protected.

	Strict Mode	Limited Mode
Currency conversion rate (exchange rate) changes	Not allowed if it can affect a finance lock/close period in any project.	System does not check for violation and finance lock/close period integrity is not protected.
Supported AETs	Effort at Resource Level (Detail), Effort from Timesheet, and Effort from Finances	All AET options
Unsupported AETs	Duration& Resource % availability, Effort at Activity Level- Equal % Distribution, Effort at Activity Level- Unequal % Distribution, and Effort at Resource Level (Summary)	None
Editing finances in yearly or aggregate (annualized) mode	Not allowed	Allowed. Finance lock may not be protected.

CLOSING PHASES AUTOMATICALLY

EnterpriseTrack allows you to close a phase automatically when all tasks and deliverables associated with the phase are complete. As the System Administrator you can define whether you want to use the auto-close function by initiative. If you choose to use the auto-close function, the phase will be closed when the last deliverable in the current phase is marked complete. The project phases are automatically advanced till the project is in the last phase. After all deliverables in the last phase are closed, the last phase remains open till the Project Lead or a user with project close permission clicks on the **Close Project** button and closes the project.

To modify the auto-close feature, navigate to the **Auto Close Phases** page in the **Settings** section of the **Administration** module. Click the **Edit** link on the appropriate row. Select **Yes** or **No** as required. Click the **Update** button to save your changes.

CONFIGURING PERCENT COMPLETION

EnterpriseTrack allows you to track what percentage of the project is complete. You can also have the system calculate the completion percentage based on various factors like phase completion, deliverable completion and effort. As the System Administrator you can use the

Percent Completion Type page in the **Settings** section of the **Administration** module to define the defaults for each initiative.

The various choices are:

- Manual completion

Users can manually enter a number.

- Phase-based completion

Number of closed phases divided by total number of phases.

- Deliverable based completion

Number of closed deliverables divided by total number of deliverables.

- Effort based completion

Actual Hours for Completed Deliverables & Tasks divided by (Actual Hours for Completed Deliverables & Tasks + Total Estimated Hours for Open Deliverables & Tasks).

RESTRICT DOCUMENT SIZE

To restrict document sizes by initiative, select the **Application Settings** tab and the **Document Size Restriction** link.

You will see a list of the current document sizes allowed for each initiative. Click the **Edit** link on the appropriate row to change the document size. Enter a new value. The sizes are in kilobytes. You can leave the field blank if you do not want to restrict the size of the documents. Click **Update** to save your changes.

REPORT ATTACHMENT MAX SIZE

To restrict attachment sizes by initiative, select the **Application Settings** tab and click the **Report Attachment Max Size** link.

Click the **Edit** link. On the **Edit Report Attachment Max Size** screen enter a new value. The sizes are in kilobytes. Click **Update** to save your changes.

MANAGE DETAIL SECTION DISPLAY PREFERENCE

You can choose to set the display of the **Detail** pane as split pane screen, pop-up screen or displayed in the main screen. You can also choose to not specify it and have the users choose the display option.

To modify the detail section display preference, select the **Application Settings** tab and click the **Manage Detail Section Display Preference** link. From the **Display Setting** pull down menu, select display preference and click the **Update** button.

MANAGE PASSWORD HISTORY AND EXPIRY SETTINGS

To modify the password history and expiry settings, select the **Application Settings** tab and click on the **Manage Password History and Expiry** link. Click the **[Edit]** link to change the number of historic passwords to keep and the number of days after which the password expires. Click **Update** to save the changes.

MANAGE PROJECT CYCLE TIME MODE

To manage the project cycle time mode, select the **Application Settings** tab and click the **Manage Project Cycle Time Mode** link. Click on the **Edit** link associated with an initiative. Choose if you want the project cycle time mode to be computed from project duration or from the summation of cycle times of all top level activities. Click **Update** to save your changes.

DISPLAY MODE FOR FILTER PAGE SECTIONS

You can choose to display the filter section all expanded, all collapsed, or keep the filter section as is. If you choose to keep the filter sections as is, then some of the filter sections are expanded and some collapsed based on your earlier (7.0) settings. All users in the system will see this change.

To modify the display mode for filter pages, select the **Application Settings** tab and click the **Display Mode for Filter Page Sections** link. Click the **Edit** link and from the pull-down menu select from **Keep The Filter Sections As Is**, **Collapse All**, or **Expand All**. Click the **Update** button to save your changes.

STREAM TICKER REFRESH INTERVAL

To set the refresh interval of the Stream Ticker, select the **Application Settings** tab and click the **Stream Ticker Refresh Interval** in the **Settings** link. Click the **[Edit]** link. Enter the **Refresh Interval** in minutes. Click the **Update** button to save your changes.

SELECTING MS OFFICE VERSION

If your organization is using multiple versions of MS Office, select the oldest version that is backward compatible.

To select the MS Office version you are using:

1. Select the **Application Settings** tab.
2. Select the **Office Version** link.
3. Click the **Edit** link. The *Edit MS Office Version* screen is displayed.
4. Select a version from the drop-down list.

5. Click **Update**.

MANAGE HELP

You can choose to leave the initial configuration setup help as is or you can attach a help document (Word, Excel, HTML, PDF, etc.) or point users to an URL address (internet, intranet, SharePoint, Wiki, etc.).

To select the type of help you will provide for configuration setup:

1. Select the **Application Settings** tab.
2. Click the **Manage Help** link. The *Manage Help* screen is displayed.
3. Select an entity (for example, Proposal/Project fields or Idea Evaluation) and click the **Edit** link next to it. The *Edit Help Type* screen is displayed.
4. Choose the type of help you will provide:
 1. Select **Initial Deployment Setup** to use the initial configuration help.
 2. Select **Document** and click the **Choose File** button to upload a document.
 3. Select **URL** and type the address.
5. Click **Update**.

SETTING THE MAX CACHE SIZE FOR LISTING PAGES

The cache size refers to the number of rows, or entities (projects, proposal, or resources) displayed in listing pages.

To select the maximum cache size for listing pages:

1. Select the **Application Settings** tab.
2. Click the **Max Cache Size For Listing Pages** link.
3. Click the **Edit** link. The *Edit Max Cache Size For listing pages* screen is displayed.
4. Enter the cache size. The recommended default value is 1000 rows and the maximum is 3000 rows.
5. Click **Update**.

MANAGE USER PRODUCTIVITY KIT

To manage the User Productivity Kit:

1. Select the **Application Settings** tab.

2. Click the **Manage User Productivity Kit** link. The *Manage User Productivity Kit* screen is displayed.
3. To change the base URL:
 1. Click the **Edit** link next to *User Productivity Kit Content Base URL*.
 2. Update the URL address and click **Update**.
4. To change the application identifier:
 1. Click the **Edit** link next to *User Productivity Kit Application Identifier*.
 2. Update the identifier and click **Update**.

MANAGE ESTIMATED TIME TO COMPLETE FOR TIMESHEET SETTINGS

To enable the Estimated Time to Complete (ETC) field for timesheets:

1. Select the **Application Settings** tab.
2. Click the **Manage Estimated Time To Complete For Timesheet Settings** link.
3. Choose an initiative and click the **[Edit]** link next to it. The *Edit Estimated Time to Complete for Timesheet Settings* screen is displayed.
4. Choose if you want to enable the ETC field for timesheets.
5. Choose if you require resources to enter their ETC for activities before submitting their timesheets.
6. Click **Update**.

MANAGE ALLOWED GRACE PERIOD IN DAYS FOR ACTIVITIES IN TIMESHEET

To change the grace period for timesheet reporting:

1. Select the **Application Settings** tab.
2. Click the **Manage Allowed Grace Period In Days For Activities in Timesheet Settings** link.
3. Choose an initiative and click the **[Edit]** link next to it. The *Edit Allowed Grace Period In Days For Activities In Timesheet Settings* screen is displayed.
4. Specify how many days past the activity completion date can team members continue to report effort.
5. Specify how many days before the activity start date can team members start reporting effort.
6. Click **Update**.

MANAGE GENERAL EMAIL DEFAULTS

You can use the *Manage General Email Defaults* screen to configure default email addresses. You can set a *From* address for emails sent by the system, and a *Do Not Reply* address.

To add general email default address:

1. Select the **Application Settings** tab.
2. Click the **Manage General Email Defaults** link.
3. Enter the default addresses.
4. Click **Update**.

MANAGE ACTIVITY LABOR COST CAPITALIZATION SETTINGS

Enabling Activity Labor Cost Capitalization allows you to select a Labor Expense Type (LET) attribute for each activity. Activity labor cost is properly rolled up into finance under appropriate expense category (Capital Expense, or Operational Expense) based on its LET.

For each initiative, you can choose to enable or disable Activity Labor Cost Capitalization, and select if you require Project Managers to enter the LET for each activity. You can also set a default LET.

To manage the Activity Labor Cost Capitalization settings:

1. Select the **Application Settings** tab.
2. Click the **Manage Activity Labor Cost Capitalization Settings** link.
3. Click the **[Edit]** link next to the initiative you want to modify.
4. Select if you want to enable labor cost capitalization.
5. Select if you require Project Managers to enter the LET for each activity.
6. Select a default LET. Project Managers can override the default values only if *Labor Cost Capitalization* is enabled.
7. Click **Update** to save your changes.

DATA IMPORT

Importing data into EnterpriseTrack is a multi-step process. EnterpriseTrack comes with pre-defined .csv templates that you must use to format the data to be imported. You must download the templates and enter the data into the template before it can be imported into EnterpriseTrack.

MODIFY METADATA FOR FILE UPLOAD

To modify the metadata for file uploads, select the **Data Import and Export** tab and click the **Modify Metadata for File Upload** link. Choose the preferred metadata and click **Update**.

DOWNLOADING TEMPLATES

To download the templates, select the **Data Import and Export** tab and click the **Download Templates** link. Depending on the primary object (Idea, Proposal, Project or Resource) for which you want to import data, click on the appropriate **[Download]** link. When the file download dialog box opens up, choose the **Save** option and save the file to your desktop. Enter the data to be uploaded in the .csv file. Based on your deployment settings, some fields may be required for certain objects. The system will validate the data before it is imported into the system. It will also check for duplicate records. Once you have completed the template, you can go on to importing the data into EnterpriseTrack.



Oracle recommends that you work with your Account manager before importing data for the first time.

IMPORTING DATA

Once you have completed the templates, you can upload it to the system, validate the data and then import it into EnterpriseTrack. To begin importing the data, select the **Data Import and Export** tab and click the **Import Data** link. Depending on the primary object for which you are importing data, select from Import Ideas, Import Proposals, Import Project or Import Resources.



If you are importing projects, there are different templates for the different sub-sections of the project. You need to upload .csv files for different sections and then validate the entire set all at once. For project data three files are required - Project, Project-Team and Project-Dates. Other files are optional. Project and its dependent files should be uploaded all at once. However, once projects have been imported into the system, project documents can be uploaded separately at a later date.

On the **Import (Object)** page, click the **[Upload Files]** link. Browse to the completed .csv file and click the **Upload** button. The system shows you the number of records that were successfully uploaded.

Once the required files have been uploaded, click the **Validate Data** button. On the **Validate Data** page, you can specify whether you want to allow changes to be made to the existing data or not. When you click the **Validate Data** button, the system works through the records and displays a count of records that have errors. All errors have to be fixed before the data can be imported.

On the **Import (Object)** page, click the **Delete Files** button to delete an existing file and import a new one. Once data has been validated, you will have to delete the file before uploading a new one (even if you are only fixing errors).

On the **Import (Object)** page, click the **Import Data** button to import the data. On the **Import Data** page, you can specify whether you want to allow changes to be made to the existing data or not. Click the **Import Data** button. The imported objects are now visible in the appropriate listing pages.

EXPORTING DATA

On the *Export Data* page, click the **Export Data** button to export the data.

VIEWING ERROR RECORDS

Click the [**View Error Records**] link to view a list of the records with errors. A dialog box will ask you if you want to open a file. This file will give you the name of the record as well as the column that has the erroneous data. E.g. If the contact information has not been formatted properly for a particular idea, the Error Message will say **Contact**.



Oracle recommends that you work with your account manager before importing data for the first time.

VIEW RATE CHANGE SUBMISSION STATUS

The *Rate Change Submission Status* page displays the status of all rate change requests in the last 7 days.

To view the submission status of all rate change requests:

- Select the **Background Jobs** tab and click the **View Rate Change Submission Status** link.